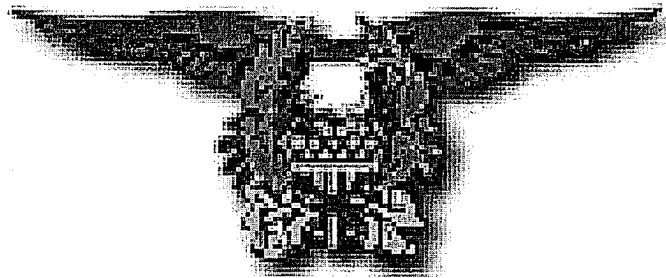


CHARTER Committee Workbook

ABATE OF WASHINGTON



Dedicated to Freedom of the Road

1.

HOLD IT!

This isn't your ordinary, run-of-the-mill, everyday ABATE manual! THIS IS A WORKBOOK! That means that you can keep it and use it while you are running your project and managing your committee. You can even put your name on the front if you want to! Read it. . - Write in it . . . Keep notes in it . . . actually use the forms in the back to keep track of your committee's details!!! You can do only one of three things with this workbook. You can either

FILE IT or READ IT or READ IT and USE IT

If you FILE IT . . . your committee will not achieve the success it should!

If you READ IT . . . your committee will achieve fair success!

If you READ it AND USE it . . . your committee will achieve as much as it strives for!

THE CHOICE IS YOURS!

This Charter Committee Chairperson's Workbook is designed to assist you in the first step of this "Management Process."

Dedication

This Charter Committee Chairpersons Planning Guide was adapted for A B A T E of Washington to use as a tool to plan, execute and record projects. Each completed project will serve as a record of how a project was run and we can learn how to better plan, execute and record our successes.

This Charter Committee Chairpersons Planning Guide was adapted from the U.S. Jaycees Management Development Series. This chairperson workbook is dedicated to the United States Jaycees, Washington State JayCees and the Puyallup JayCees. The Jaycees believe in Leadership Training through Community Development. Most Jaycee projects are run using the Chairpersons Planning Guide.

2.

Table of Contents

	PAGE
DEDICATION AND Read and use it / Table of Contents	1 & 2
YOU ARE NOW THE CHAIRPERSON	3
GETTING STARTED	4
A Recurring Project	4
A New Project	5
Presentation to the Board	5
Presentation to the Membership	6
THE COMMITTEE	7
Selecting the Committee	7
Chairing the Committee	8
Meeting with the Committee	11
THE CHARTER CHAIRPERSON'S PLANNING GUIDE	13
Planning	13
Implementation	15
Evaluation	16
SUMMARY	17
THE FINAL REPORT	19
A SAMPLE COMPLETED	
CHARTER CHAIRPERSON'S PLANNING GUIDE _____	20
Charter Chairperson's Planning Guide _____	26-27
Your Committee Members	28
Chairperson's Follow-Up Sheet _____	29
COMMITTEE WORKSHEETS	
Calendar of Committee Actions _____	30
Committee Meeting Agenda	31
Chairperson's Notes _____	32

3.

You Are Now the Chairperson

- Whether it was your idea for the project or somebody else's.
- Whether you are enthusiastic about the chairpersonship or somewhat reluctant.
- And regardless of exactly how you were appointed

— YOU ARE NOW THE CHAIRPERSON!

If you are like the rest of us (and this is your first time being CHAIRPERSON) it's quite normal to be asking yourself questions similar to the following:

What did I get myself into?

What do I do now?

First, let's put your chairpersonship into perspective. The primary purpose of ABATE is to develop an organization to defend our Freedoms and promote Safety. Being a committee chairperson is an excellent means for you to strengthen or develop some very important management skills that will assist you to develop those skills. As a Committee Chairperson you should learn to set goals, make decisions, develop a plan, run a meeting, work with others — all this with the end result being that you help somebody. Whenever you help others, you always help yourself.

Along with the self satisfaction that you will gain in this experience, the skills that you strengthen or develop are practical skills. They can be applied to all phases of your life. Whatever your vocation or profession, you will accomplish more if you effectively plan your work and then implement that plan! You'll progress faster as you better learn how to work with associates! Your personal financial situation will be less frustrating as you set financial goals for yourself and plan expenditures! These are just a few of the examples of how you can apply what you learn as a ABATE Charter Committee Chairperson to your personal life.

You have undoubtedly noticed that you are not referred to as a Project Chairperson, but rather as a Committee Chairperson. That's because ABATE members are in the Freedom business not the project business. To successfully accomplish the goal of your project you must work effectively with and through people. If you question this, try running the project without people!!! A section of this workbook gives you some tips on how to effectively manage the people on your committee.

Basically, your job is one of putting together a lot of small jobs. Being sure that each member of your committee knows what they are supposed to do, when they are supposed to do it, and then does it when they should. Each committee contributes to the success of the overall project. How well they make a contribution, or rather, how successful the project will be, depends directly on how well you manage your plan and your people.

Getting Started

There are, basically, two types of projects — the ones that are new to the chapter and those that are run each year, or recurring projects. The recurring project should be in your Chapter's records and, if applicable, have already been budgeted for; while the new ones are not in the chapter's plan and are not considered in your chapter's budget.

Regardless of whether you are chairing a new project or a recurring one, the first thing to do is to talk with the Chapter Officer who is assigned to assist you with your project. He will have some thoughts and ideas concerning the project. Establish an immediate channel of communication with him. His relationship with you should last the length of the project and should be one of guidance, direction, and assistance when needed.

A RECURRING PROJECT

If the project is a recurring one, your assigned Officer will be able to tell you if there has been any money appropriated in the Year's Planned Budget for it and any other requirements that have been predetermined by the Year's Plan of Action. He will also obtain for you last year's Chairperson's Planning Guide, if one was prepared.

If the Chairperson's Planning Guide is available, read it before you talk to last year's chairperson or committee members and before you meet with your committee. Pay particular attention to the section which offers recommendations for future years.

NOTE:

ALWAYS VIEW A PRIOR YEAR'S CHARTER CHAIRPERSON'S PLANNING GUIDE AS A TOOL

IT IS NOT THE LAW. . . IT IS A REPORT ON HOW A PROJECT WAS DONE IN THE PAST, NOT THE PLAN FOR HOW YOU ARE TO RUN THIS YEAR'S PROJECT . . .

YOU SHOULD NOT LET IT STIFLE YOU'RE CREATIVITY! ASK YOURSELF —

How can I better fulfill the purpose of this project than was done in prior years?

And is there still a need for this project?

Even though the project is in your Chapter's Year of Planned Action it's a good idea to take a fresh look and see if there is still a real need for the project to be run this year. If you should honestly feel that there is not a need to run the project this year, relate this fact to your assigned Chapter Officer, immediately. Because . . . you are probably right!

After you have determined the necessity of the project, reviewed all prior year's materials and have discussed it with last year's chairman and/or committee members, meet with your assigned Chapter Officer. Review with him basically what you feel must be done. Once you and he have discussed the project, it is time to appoint the committee — before the planning section of the Chairperson's Planning Guide is completed. This will enable the entire committee to be part of the detailed planning process, and this will greatly enhance their commitment to the project. Some tips on actually obtaining committee members are discussed later in this workbook in the section entitled "**The Committee**".

A NEW PROJECT

If you are appointed chairperson of a project that is new to the chapter, gather all the basic data there is available. If an outside organization or individual is to be involved in the project, give him a call and find out his needs and/or desires! Also, find out what resources he or his organization can provide you. If it is a program which is promoted by ABATE of Washington, find out if materials are available. Also, see if there is someone in ABATE that you knows the project area. Do whatever is needed to get the basic information you will need to determine the following:

1. The purpose of your project.
2. The specific goal(s) to be accomplished.
3. The net cost, if any, to the chapter. In case this is a fund raiser, estimate the income, also.
4. The number of members needed:
 - a. to serve on the committee
 - b. to assist or participate in the actual project.

Once this is done you should have enough information to make a presentation to the Board of Directors if it is required for project approval. If this is your first presentation, ask your assigned Chapter Officer to assist you with its preparation and, if necessary, with its presentation. Some tips on making the presentation follow shortly.

After board approval, get the committee appointed with the assistance of your assigned Chapter Officer. Again, it is recommended that this be done before the completion of the planning section of the Chairperson's Planning Guide, and before a presentation to the membership. The same rationale applies as in the case of recurring projects.

PRESENTATION TO THE BOARD

When presenting a new project for approval to the board is sure the presentation is clear, concise, and complete. As previously mentioned in the "A New Project" section, the board will be primarily interested in (1) its purpose, (2) the goal(s), (3) the cost or income, and (4) the number of members needed.

Always bear in mind that the board considers the whole chapter (or State) before it approves new projects, and, for this reason, you should expect questions and discussion on:

Are the purpose and goals consistent with those of the Chapter (or ABATE of Washington)?

If the project is not a fund-raiser, where will the money come from?
That is needed to run the project?

Is the timing of the project in conflict with other projects?

Is it of true value to the members and/or ABATE?

Do they have enough members, or would this project overload them?

Is there a financial risk; if so, how much?

6.

Probably the most frequent reason projects are not approved is because of "no money available." If your project will cost money and you know your chapter is short on cash, prepare yourself with some alternatives before you meet the board. The following series of questions will assist you if you find yourself in this situation:

1. Have you considered obtaining cash donations from local businesses or Organizations, usually given in return for some type of recognition or publicity?
2. Have you exhausted all opportunities for getting budget items donated? (Not only materials but also services) such as free use of vehicle, copying Machine, meeting place, etc.
3. Could you combine your project with a. new fund raising project such as? Rummage sale, casino party, raffle, or anything else your imagination Can devise?
4. What resources do the individual members of your chapter have that could Reduce costs such as a lawyer who can reduce your legal fees, a printer Who can reduce your printing costs, etc?
5. Have you checked with local or state authorities to see if government funds may be available?

The board is also very interested in a project's
Publicity Value
And
Recruitment Value

If your project will get the chapter's name in the paper and will possibly result in a few new members for the chapter, be sure that these facts "headline" your presentation. It's sure to "perk up their interest" in your project.

PRESENTATION TO THE MEMBERSHIP

After the Board approves your project you may be required to make a presentation to the membership. The two basic reasons for this presentation are:

1. To familiarize them with the project, the need for it, and its value.
2. To enlist their support.

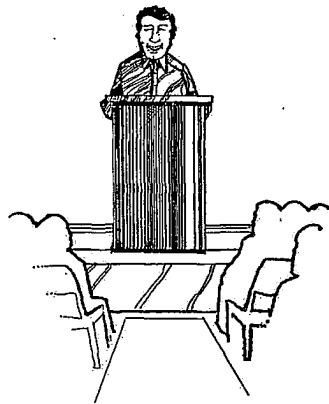
This presentation is important to you and your committee; especially if you are going to need some of the chapter members to assist you in the project at a later date. So the more you look like you know what you're doing, the better the response will be when you call on them later for assistance.

7.

Prepare yourself in advance and be sure to cover the following in your presentation:

1. Purpose and benefits of the project
2. What the project consists of
3. When it will take place
4. Manpower requirements
5. Costs and revenue, if any
6. Publicity and recruitment value

Again, be clear, concise, complete, and enthusiastic! Organize yourself — jot down a few notes beforehand to assist you during the presentation. A flip chart or chalkboard will also greatly assist you. Conclude with a question



The Committee

SELECTING YOUR COMMITTEE

When the time comes to select your committee, talk to your assigned Chapter Officer. Review with him the best means by which to recruit the members you need. Don't assume that the committee will suddenly appear from nowhere - . . . Be sure to determine what method(s) is to be utilized. The best method may be one or any combination of the following:

- Have Board of Directors appoints them;
- Have the Coordinator appoint them;
- Recruit them from the membership yourself;
- Ask for volunteers;
- Recruit new members to fill some of the positions.

Before your committee is actually recruited, determine the following:

- How many members you need;
- Generally, what are the job descriptions for each position on the committee?

8.

To determine what the basic job descriptions are, first list the major actions that must happen to make the project successful. Following is a list of actions to give you an idea of what to consider:

- | | |
|------------------------------------|---------------------------------|
| -Secure facilities | -Publicize the event |
| -Arrange for and schedule manpower | -Obtain funds |
| -Print items | -Arrange for meals |
| -Liaison with another group | -Take care of VIP's |
| -Handle money | -Register people |
| -Obtain special equipment | -Record activities of committee |

Once you have the major actions listed, estimate the amount of time it will take to accomplish each action! Then combine actions into specific jobs so that common items are handled by one person and each job requires about the same amount of time to perform. As you create the number of jobs, or rather, the number of people needed on the committee, bear in mind that "the bigger the committee, the harder it is to control." So make all attempts to keep the committee small enough to be effective.

A good size for a committee is from four (4) to seven (7) members. Sometimes committee members are selected because of their personal interest in the subject on which the particular committee will act. In other instances, it is important to choose members with special abilities or technical knowledge. With committees, the job, the individuals, and the individual's interest must be fitted to each other. As the committee members are recruited you will find some members ready to join right in, while others will need a fair amount of persuasion. So the more specific you are about the jobs that need to be filled, the easier it is for a member to make a decision to join you. And when you are selling the idea to a potential committee member, be enthusiastic! If you are not "sold" on the project, then you can't expect to "sell" him.

(NOTE: At the end of this workbook is a sheet entitled "Your Committee Members" for you to record their names, addresses, phone numbers, and other pertinent information).

CHAIRING THE COMMITTEE

Any successful committee has one person who stands out as its leader. They are the person who is willing to take the initiative and start things off as the others wait. That person is YOU! The rest of your committee will wait to see what you do; if you don't do anything, neither will they.

A key to a smooth operating committee will be your ability to "LEAD BY EXAMPLE!" Do not demand less from yourself than you do any of your committee members. Fulfill all commitments you make to the committee, as a whole, and to its members, individually. Be prepared to assist a committee member at any time. Many times he just needs a little bit of encouragement or a contact with the proper person to smooth the path and keep him going. You should furnish this and work closely with him until he can do it completely by himself. By the same token, be sure he gets full credit for his accomplishments.

9.

Always remember that you are coordinator and a motivator, not a “dictator.” So tact is really one of the most important tools you have for accomplishing your objectives. You should always recognize that the members of your committee have a job and (in most cases) a family which come before the project. The good chairman insists upon cooperation which doesn't interfere with these two primary interests.

Be fair . . . be honest . . . don't play favorites!

Get to know each member — where he works; what he does; his wife's or girl's name; his interests; etc.

As you delegate the job responsibilities to each member, be sure to delegate to them a certain amount of authority. He also has the ability to make decisions, and if you leave all the decision-making to yourself, you'll soon find that he will “decide” to drop off the committee. For example, if you've assigned him the responsibility for getting the tickets printed, let him decide what printer to use, what color the tickets should be, and on what type of paper they should be printed. As long as he is within his budget, let him do his job.

Impress upon each member that the overall success of the project rests upon whether or not he fulfills that responsibility, and when you give him a job, let him do it. Don't assign a job, and then proceed to “help” him by doing it for him. As each committee member is delegated their equal share of authority and responsibility, tell them exactly what his job is and what results are expected from him. **DONT ASSUME THAT HE KNOWS WHAT TO DO JUST BECAUSE YOU GAVE HIM A TITLE!** If you put his job description in writing, there will be no misunderstanding.

The biggest key to the effective “management” of your committee will be your ability to “follow-up.” Side interests and business and family interfere with good intentions. The only way you can be sure a committee member does what he's committed to do is to “follow-up” with him as often as necessary until his assignment is complete.

Following-up on all the details that ensure the success of the project is difficult. It is difficult because a lot of people resent “being checked upon.” Use as much diplomacy as possible, but never let a person's reaction to your questions be a reason for not following-up. To assist you, the following guarantee is offered — “There is a 90% chance that those who complain the loudest about ‘being checked upon’ are not doing what they are supposed to, when they are supposed to do it.”

(NOTE: At the end of this workbook a sheet entitled “Chairperson's Follow-Up Sheet” for you to record who is responsible for what and when it's supposed to be done.)

We mentioned earlier that you are to be the 'motivator' of the committee. You cannot motivate others — they can only motivate themselves, because people do things for their reasons — not yours. But you can create the environment by which each member has the best chance to motivate himself! To create this environment, follow

The seven (7) "Keys of Motivation" —

1. Consider him and his job important.
2. Praise his efforts.
3. Ask him for advice.
4. Listen to and respect his opinions.
5. Provide him with meaningful assignments.
6. Encourage him.
7. be sure he knows what is expected of him.

There will still, however, be problems caused by committee members who feel they can't work together, or don't want to work together. You will be a more effective chairman if you can recognize and deal with these problem types before they become problems. Following is a list of the five (5) most common types of people who need to be handled somewhat differently. You'll recognize most immediately. The list gives you a quick look at their characteristics, then a few recommendations on how to handle them:

The Talker — No matter what the question or issue, he has an answer, and usually a long one. He enjoys the sound of his own voice, but others soon tire of him. When he stops for a breath, thank him and move on. If this doesn't work, ask for some other committee member's opinion. This technique will usually squelch a "talker."

The Turtle — He's the opposite of the talker. He pulls his head into his shell and doesn't say a word during the entire meeting. With a little encouragement, you can get him to talk. Compliment him the first time he says anything. Ask him a direct question you feel he could easily answer. Often the quiet person has a great deal to contribute once you get him to talk.

The Show-Off — He's easy to spot. The "show-off" writes on the table cloth, tells his neighbor a story he heard this morning, laughs more loudly than anyone else, and participates in a host of other distracting activities. Ask the "show-off" a direct question; it will give him something to do with his mind. Other committee members who are interested in what is happening at the meeting will often come to your aid. If all else fails, talk to the "show-off" privately and explain that his actions are disrupting the committee meeting.

The Fighter — He is opposed to every idea or comment presented. Nothing pleases him and he wants everyone on the committee to know it. Don't let the guy bother you. Try to use some humor. Let other committee members react to any obvious misstatements the "fighter" makes. Another solution is to get him working on his committee assignment. This will keep him working and thinking — so he doesn't have time to be a problem member.

The Bragger — this fellow is interested in getting recognition by boasting of his achievements and acquaintances. He may say, "In my letter to the Governor last week, I indicated . . . "To handle the "bragger," politely ignore him. The other committee members will soon ignore him too. This treatment will help a "bragger" become a more useful committee member.

Don't let these five types scare you; because they are in the minority. Most of the members of your committee will be much easier to work with. One of the biggest benefits you derive from being a Chairman is to have the opportunity to take several different personality types and get them to work together as a group.

If you should have a committee member who doesn't perform no matter how you try to help him — consult your assigned Chapter Officer. Do not let one individual spoil the attitude of the entire committee. There are some clue phrases that potential problem individuals tend to use. If any of your committee members use any of the following phrases too often, it may very well indicate that he is not doing his job:

"I didn't get the message!"	"As soon as get around to it!?", "I've been too busy!"
"You can count on me!"	"We've still got plenty of time!"
"I thought Joe was supposed to do that!"	
"It's all taken care of!"	"I forgot!"
"My wife's on my back!"	"Don't worry about the details!"
"I've been working late!"	"My boss is on my back!"

These phrases or, rather, excuses usually are delivered with a tremendous amount of sincerity. But don't be fooled, if they come more than twice from the same individual, you probably have a guy who's not doing what he's supposed to do when he's supposed to do it!

MEETING WITH THE COMMITTEE

The success of all the committee meetings you have is your responsibility — nobody else's! The main ground rule for every meeting is that it "has a purpose." There always has to be a reason that you get the committee together. To ensure that your meetings "have a purpose" be sure that the reason for calling your meeting is any one or a combination of the following:

1. - To make specific committee decisions.
2. To solve problems.
3. To check the progress of all results and actions to date and to discuss upcoming events.

Never have a meeting just to say you held a meeting whenever possible. Always give your members plenty of advance notice of any meeting — at least a week, if possible. Use the mail or call them individually. And try to hold the meeting at a central location — your chapter's meeting hall, if you have one and it is available. If not, hold the meeting in your home or the home of another committee member.

12.

Another ground rule: "If a meeting is worth having, it's worth having an agenda!" An agenda is nothing difficult; it's simply a list of the things that are to happen at the meeting. That's all it is! It is not something that only a parliamentary procedure wizard knows how to prepare!

(NOTE: At the end of this workbook is a sheet entitled "Committee Meeting Agenda" on which is a sample agenda plus space for you to write up agenda for your meetings.)

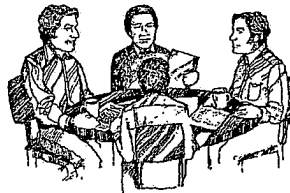
If possible, prepare the agenda and mail it to your committee before the meeting. At least have one for yourself. Nobody says your agenda has to be typed; it's nice, but by no means necessary. A handwritten one is always acceptable. Some basic committee meeting ground rules are:

1. Start on time.
2. Stick to the agenda.
3. Keep it informal.
4. be sure everybody is heard.
5. Keep the meeting moving at all times.
6. Adjourn on time, if at all possible.

Appoint someone as secretary at your first meeting. They can be a big help to you. The minutes make it possible for you to follow-up on assignments. If the minutes are written up promptly, you can do more planning for the next meeting and use them as a guide. Copies of the minutes should go to each person who has an assignment. Clippings, photos, printed matter, etc., should be placed in the committee secretary's hands to be submitted with the final report.

In addition to appointing a secretary at the first important meeting, be sure that they all understand the exact purpose and goals of the project. It's a good idea to have an informal social time planned after this meeting to ensure that your committee members get to know each other.

Hold meetings at times that are convenient to all your committee members. If it's convenient to meet some morning at 6:30, then meet; if it's more convenient to meet after the ballgame on Saturday, and then meet after the ballgame. The key is to meet when all your committee members are available and the time is convenient to them. The more successful and fruitful your committee meetings, the fewer you will need to have!



The Charter Chairperson's Planning Guide

The Charter Chairperson's Planning Guide, itself, is a one page guide that is designed and intended to be used as a planning tool and a leadership training tool. Unless you and your committee are using the Charter Chairperson's Planning Guide during your first step of planning, you are cheating yourselves and your chapter by failing to do the best job possible.

The Charter Chairperson's Planning Guide serves as a workable tool for effective planning, financial management, continued success, evaluation, and system and record-keeping, it also serves as an excellent format for presenting the final report. It will help you think a project through from beginning to end and will enable you to evaluate your project as it is progressing. The Charter Chairperson's Planning Guide will enable you and your committee to make things happen on purpose rather than by accident.

(NOTE: At the end of this workbook is a sample Charter Chairperson's Planning Guide and a sample of a completed Charter Chairperson's Planning Guide.)

The Charter Chairperson's Planning Guide is, in fact, a practical planning process. It is also a thought process. It is merely a logical series of questions that must be answered to ensure the success of any project. These questions are also applicable to any personal real-life situation. You can use this Guide to plan your career, your personal financial situation, the purchase of your next car, or your next vacation. Remember, it's a thought process. A good portion of what has been presented in this manual thus far has been directly related to the questions that should be answered on the Charter Chairperson's Planning Guide. For example, on page 4 which talked about the basic information that is needed for your presentation to the Board of Directors is the basis for the information that is needed for the completion of questions 1, 3, 4, and 9 of the Charter Chairperson's Planning Guide.

Each question on the Charter Chairperson's Planning Guide is explained in subsequent sections of this workbook. Questions 1 through 9 are explained in the "Planning" section, questions 10 through 13 in the "Implementation" section, and 14 through 18 in the "Evaluation" section.

PLANNING

The planning section of the Charter Chairperson's Planning Guide consists of a series of nine (9) logical questions that, when answered, will lead to a more efficiently planned project, a greater understanding of what is to be accomplished, and greater assurance of success. Following are brief explanations of what information is needed to complete each of the nine (9) questions in the planning section:

Remember — the ultimate responsibility for this project is yours, so take the time and patience to plan it well.)

1. Primary Purpose. A brief, concise statement of why the project is to be conducted.

2. Relationship to Chapter's Goals. Describe briefly how the project originated and the relationship of this project to the goals and objectives of the chapter. (If you're not sure what the goals are, consult your assigned Chapter Officer.) Explain how this project will contribute to the overall success of the chapter.

14.

3. Specific Goals of Project. What specific, measurable goals are established for your project? What are the results you are working toward? Set numerical goals whenever possible, such as the number of people to participate in a program; if this is not possible, set tangible goals, such as the construction of a baseball field.

4. Specific Manpower Assignments. Who is the Chapter Officer that has overall supervisory responsibility for this project? Who is the project chairman? Give names, addresses, and telephone numbers and a brief description of job responsibilities for each key subcommittee chairman. Also, list the number of people needed to work on various aspects of the project and when they will be needed. This planning step will clarify for each individual the role he has in the overall project success.

5. Materials and Supplies Needed. Every project has materials and supplies. Whether it is envelopes, stamps, paper, pens, hammers, or nails. List all that will be needed to successfully conduct this project, regardless of whether they are expected to be donated or purchased. It is further recommended that names of those responsible for securing the materials be noted. You may also wish to include the date by which the materials must be available and the possible sources.

6. Community Resources to be utilized. A vast number of resources could be classified into money, materials, facilities, and the time and talent of non-members. Consider other groups and organizations. Note the names, addresses, and phone numbers of other parties to be involved.

7. Anticipated Problems and Alternatives. Something will go wrong! Expect it! Plan for it as best as you can! This step in the planning process is extremely important. Take the time necessary to explore the possible pitfalls or dangers you may encounter. This is essentially negative brainstorming in order to understand ahead of time, as much as

Possible, what things might prevent the successful completion of this project. Some of the problems that may arise are:

- a) Governmental Red Tape;
- b) Lack of interest or support;
- (c) Lack of funds;
- (d) Lack of ability, time, or manpower to do the job;
- (e) Employer's objections that project will interfere with job.

The following steps will assist you:

- (a) Brainstorm possible problem with your assigned Chapter Officer and/or committee.
- (b) List those potential problems you feel are legitimate. An earthquake may be possible, but it is not too probable.
- (c) Brainstorm two, three, or four solutions for each problem.
- (d) Record each potential problem with its possible solutions in this Charter Chairperson's Planning Guide.

8. Specific Steps and Dates. Every project has a "D-Day." This is the day your project "happens." Just the setting of that date will be one of the toughest decisions you and your committee will have to make. Be sure that it's a decision made by the whole committee so that they have a joint responsibility to fulfill it. Many projects never come off because the "D-Day" is too close at hand and there isn't enough time to get the job done. Once the date is set, you can schedule all the actions of each committee member. Assign an approximate date to each action of each committee member. When do they need to be completed? If they are going to be accomplished on schedule, when must they begin? Each of your committee members should go into detail and specifics in scheduling their portions of the project. Consider other projects scheduled at the same time, holidays, and vacation time of these people when setting dates. From this, you can develop a master schedule to help you monitor the activities of all committee members on a daily or weekly basis. Only with such a schedule can you tell when things are going well or you have a problem. Don't wait until "D-Day" to discover you're off schedule.

9. Complete Proposed Budget. The reverse side of the Charter Chairperson's Planning Guide has a printed budget for your use. The column entitled "Proposed" should be completed as a part of the preplanning of your project. Estimate your income from all sources. How much will be needed from the chapter treasury? Will money be needed to pay certain expenses before funds will be realized from outside sources? Itemize the costs expected with the project. How much money will be expended and on what items? Analyze various ways you can save money. Ask yourself, "could this be done cheaper?" (Ask yourself the same questions that appear in the "Presentation to the Board" section of this workbook on page 5.)

IMPLEMENTATION

All the time you spend in planning is meaningless if it is not put into some form of action . . . if the plans are not implemented.

The implementation stage of any project is by far the most exciting. This is the time when all your plans and ideas unite . . . when words become action when Jaycees shine!

Don't let this excitement totally set you adrift from some of the not-so- exciting responsibilities that you have as a Committee Chairperson. You are the "manager" of the committee. You are the one who must:

- record all the actions or steps taken and continually compare them to your estimates;
- recognize problems before they occur;
- assist a committee member when he needs help;
- continually keep his thumb on the pulse of the committee and their actions.

Following are brief explanations of what information is needed to complete each of the Charter Chairperson's Planning Guide Implementation questions, numbers 10 through 13:

10. Specific Steps Taken and Their Results. As the various aspects of the project are started, record briefly the action taken and when. As the project progresses, you will find it helpful to be able to refer to prior action. Be brief and concise, showing important items, such as: times, people involved, decisions made, and commitments made.

11. Revisions and Changes in Plan. It is not realistic to expect that you and your committee have designed the perfect plan. Your pre-planning should eliminate unanticipated major problems which would require major revisions. Some changes will still, however, take place. Make a record of any changes, large or small, that are made as the project is conducted. It is likely an alternative method for anticipated problems may have to be used. Record the alternative method that was used and why.

12. Record Income and Expenses. As expenses or costs are incurred, make a record of them. This will prevent you and the chapter from being surprised by a bill long after the project is completed.

13. Roles of Non-member. List those organizations and individuals that contributed to this project. Include not only those that contributed materially, but also those who served as advisors or provided manpower. It is a good idea to record the names and addresses of those who assisted you. Remember to express your appreciation to these people after the project is complete. Definitely send thank you letters and, if you feel they deserve one, give them a Certificate of Appreciation.

EVALUATION

An objective evaluation is, at best, a difficult process. You do not write an evaluation just to make it good reading in an award entry; the purpose of an evaluation is to provide a sound synopsis of what happened and to make specific recommendations for improvements should the project be run again. So, don't write a fairy tale. It was mentioned earlier in the Planning section that you would probably make mistakes — you probably did. It's your responsibility to be sure that these same mistakes don't happen again. Just call the shots as you see them. That is all ABATE members expect from each other.

Following are brief explanations of what information is needed to complete each of the Charter Chairperson's Planning Guide Evaluation questions, numbers 14 through 18: (Again, this project was your responsibility — so evaluate it as you see it.)

14. Capsule Evaluation. Describe your thoughts, opinions, and evaluation of the overall project. Be specific enough to tell how the project was carried out in relationship to the planning that was done. To what degree did you achieve the primary purpose of the project? Were the goals attained? Describe briefly, but honestly, what you personally gained from this project and what was gained by your committee members.

17.

15. Unanticipated Problems. Describe the major problems experienced and how you arrived at the final solution. In the case of problems that could not be overcome, outline why and what impact these problems had on your overall success.

16. Recommended Changes. Should the project be run again? If the chapter runs your project next year, what should be done differently to ensure greater success? Step back and make an objective evaluation of how the project might have been improved. Through this careful evaluation, you and your committee members will gain insight into planning and leadership. Make recommendations to those project chairmen who may be running similar projects. Allow them to learn from your experience.

17. Financial Problems Encountered. Financially, was your project a success or failure? If either the anticipated income or expenses varied greatly from the budget, explain why. Were the factors controllable or uncontrollable? Did you receive some unanticipated income? Or, did you underestimate your income? Were there some contributions received that were anticipated as cost items? Were the anticipated expenses overstated or were certain items found not necessary for the completion of the project? Explain how financial problems experienced during the course of the project were handled.

18. Benefits to be derived. It is important that you analyze this project in relationship to your fellow members. Since their individual growth is of primary concern to us, how will they grow by participating in this project if it's run again? What will they learn? What skills will they develop? Consider the possibility of turning the project over to some other organization with members assisting them, thus still providing growth opportunities for interested members.

Summary

This summary is presented in outline form and summarizes the preceding sections of this workbook. It is designed to give you a means to quickly refresh yourself with the main points of chairing a committee.

- I. You are now the chairperson.
 - A. An opportunity to better you while helping others.
 - B. Your job is to put a lot of small jobs together

II. Getting Started

A. See your assigned Chapter Officer

B. A recurring project

1. Check current year's budget
2. Read last year's Charter Chairperson's Planning Guide
3. Verify need to run the project this year
4. Appoint the committee

C. A new project

1. Obtain basic data about project
2. Determine purpose, goals, cost and manpower requirements
3. Present to Board of Directors.
4. Appoint the committee

D. Presentation to the Board

1. Prepare clear, concise and complete presentation
2. Emphasize consistency with chapter's goals, true value of project, *Publicity value and recruitment value*
3. Present alternate means of financing project if money is a problem

E. Presentation to the membership

1. Prepare clear, concise, complete and enthusiastic presentation
2. Important, because you'll be calling on them for help later

III. The Committee

A. Selecting your committee

1. Select the best method(s) to recruit members
2. Determine basic job description and size of committee
3. Sell project enthusiastically

B. Chairing the committee

1. Lead by example
2. Coordinate and motivate, never dictate
3. Be fair and honest and don't play favorites
4. Get to know your members
5. Delegate authority as well as responsibility
6. Give a person a job and let them do it
7. Follow-up . . . follow-up... follow-up
8. Praise, ask opinions, listen and encourage
9. Excuses are clues to people not performing

C. Meeting with the committee

1. Meet only to (a) make a decision, (b) solve problems, and/or (c) check progress and discuss upcoming events
2. Give advance notice of meetings
3. If a meeting is worth having, it's worth having an agenda
4. At first meeting (a) appoint secretary; (b) discuss purpose and goals of project, and (c) socialize a little.

19.

IV. The Charter Chairperson's Planning Guide

- A. A planning and leadership tool
- B. A practical planning process adaptable to all phases of your life

V. The Final Report

- A. Expresses the pride of you and your committee
- B. Complete while facts are still fresh in your mind
- C. Becomes basis for providing recognition
- D. Make it neat and readable
- E. Attach substantiating materials
- F. It will make the project better the next time it is run

The Final Report

After the project is completed, the bills paid, the thank you notes sent, and an article written for your local newspaper and your chapter's newsletter, it is time to prepare the final report.

The final report will reflect the pride you and your committee have for the project and a job well done. It is important that you do the report as soon as possible after the project is completed, while the facts are still fresh in your mind. Your assigned Chapter Officer will know when the report is formally due to the chapter.

To those reviewing it, a typewritten or neatly handwritten report says, "Yes, we are proud of the project!"

The report becomes the presentation to the Board and the membership and serves as the record of the project. Next year's chairperson will be able to review it and, hopefully, conduct a more successful project. Many chapters use the presentation as a part of their membership recruitment or orientation program. It serves as an excellent method of showing prospective members or new members just what has been done by the chapter.

The project report will also become the basis for providing recognition of the committee that worked so hard to make the project successful. Hopefully, your chapter will be selecting an Outstanding Committee Chairperson and an Outstanding Project this year, and the means by which they judge will be your final report. Your project is also eligible to be submitted to state, awards competition.

20.

The report is the Charter Chairperson's Planning Guide with all questions and statements completed, plus all substantiating data. The following hints on preparing it may be helpful to you:

1. Be as neat as possible.
2. Make it as readable as possible, eliminate useless verbiage.
3. Attach that material which may be useful to future chairperson. For ease in reading, it is suggested that the material be gathered into one of the following groups: correspondence, news clippings, financial data, photographs, statistical records, and promotional material.
4. Place the report and other material in a binder to hold it together.
5. Remember, you are preparing a report that will carry your name and may be seen by many others. So be sure it reflects the pride you and your committee feel for the project.

Sample Completed Charter Chairperson's Planning Guide

1. Primary Purpose. To alleviate the blood shortage at the Bleep Memorial Hospital.

2. Relationship to Chapter's Goals. Our community survey disclosed that the number of industrial accidents triples during the peak of the harvesting period in August and September, and that the need for blood during that time frame is critical. This was selected as our No. 3 priority and put into our Year of Planned Action. Since this is a priority need of our community. In addition, the involved members will benefit by developing their management skills and by dealing directly with another service organization.

3. Specific Goals. To donate 200 pints of blood to the Bleep Memorial Hospital by July 31st.

4. Manpower Assignments.

Committee Chairperson:

- a. Coordinates activities of entire committee
- b. Assists sub-chairpersons as necessary
- c. Liaison with Bleep Red Cross
- d. Liaison with Bleep Memorial Hospital

A ABATE of Washington Member Representative:

- a. Assists Red Cross in obtaining doctors and nurses
- b. Sets up free snack area for donors

Public Relations Sub-Chairperson:

- a. Sets up publicity campaign with all media
- b. Writes all news releases and scripts
- c. Sets up poster publicity campaign
- d. Obtains slot on "What's New in Bleep?" radio talk show

21.

Facilities Sub-Chairperson:

- a. Obtains facility
- b. If necessary, obtains liability insurance coverage
- c. Obtains furniture — chairs, beds, tables, etc.

Manpower Sub-Chairperson:

- a. Schedules manpower needs
- b. Obtains members to fulfill manpower requirements

5. Materials and Supplies Needed

Central facility with room for 10 beds and 5 tables,
10 hospital beds, .50 chairs, .5 —6' tables
Pens, paper, tape, stapler, etc Small reception table
.100 posters 12' banner
.4 garbage cans with plastic bags
250 pre-printed "Thank-You-for- Donating" letters
-Snacks, coffee, milk, sugar, juice, and paper necessities
.50-cup coffee urn
250 Styrofoam cups

6. Community Resources to be utilized.

- a. Manpower equipment and expertise of the Bleep Red Cross —
Red Hart, Executive Director — 171 Blood Alley — 755-1213
- b. Manpower of Bleep Memorial Hospital- Dick Dracula, Community Development
Director — 23 Mercy Circle — 755-6777
- c. Facilities — hopefully the Iowa Coast Guard Armory can be
Obtained free of charge

7. Anticipated Problems and Alternatives.

Possible Problem
Possible Alternatives

22.

8. Specific Steps and Dates.

DATE PLANNED ACTION

- June 17 planning section of Charter Chairperson's Planning Guide completed.
- 19 Presentation to membership.
- 21 First Committee Meeting.
- 22 Red Cross and Hospital contacted.
- 28 Facility confirmed.
- July 1 Initial news release to all media.
 - Insurance coverage checked into.
 - Banner and posters ordered.
- 7 Line up whatever furniture is needed.
 - Confirm spot on "What's New in Bleep" radio show.
- 15 Second Committee Meeting.
- 16 100 posters distributed.
 - Doctors and nurses confirmed.
- 17 250 "Thank You for Donating" letters printed.
- 20 Obtain and/or confirm usage of all supplies.
 - Confirm manpower.
- 21 Deliver news releases to all media for final blitz.
 - Pick up banner.
- 25 IF NEEDED — 3rd Committee Meeting.
- 26 Chapter Presidents and Committee Chairperson on "What's New in Bleep" radio show.
- Follow-up on manpower final confirmation.
- 27 Set up facility.
- 28 Thursday evening — take blood donations 5:00 to 9:00.
- 29 Friday evening — take blood donations 5:00 to 9:00.
- 30 Saturday all day — take blood donations 8:00 to 5:00.
- August 1 wrap—up news release to media.
 - 3. Thank—you letters mailed.
 - 10. Completed Chairperson's Planning Guide and final report submitted to membership.

9. Complete Proposed Budget. See "Budget Sheet."

IMPLEMENTATION

10. Specific Steps Taken and Results.

DATE ACTION TAKEN

- June 17 planning section of Charter Chairperson's Planning Guide completed.
- 19 Presentation to membership.
- 21 First Committee Meeting.
- 24 Red Cross and Hospital confirmed.
- July 5 Special Committee Meeting called — the armory not available
Red Cross representative present — Red Hart.

•Poor Manpower Turnout	-Line up 3 more people than actually needed for each shift •Contact Bleep Elks Club or Lions Club for assistance
•Coast Guard Armory Not Available	-Use lobby of City Hall •Set up in Metro Shopping Center •Elks Club Hall
-Poor Donor Turnout	-Run an additional night -Get ministers to promote — run additional 4 hours right after churches get out •Have Dracula make house calls

- July 7 Inside Metro Shopping Mall confirmed as location for blood drawing.
Mall's insurance will cover us.
- 9 Initial news release to all media.
Banner ordered.
- 10 Confirmed donations of chairs and tables by Bleep Elks Club.
Hospital beds confirmed with Bleep Memorial Hospital -
- 12 Posters done by hand in Chairperson's garage.
All doctors and nurses confirmed.
- 16 250 "Thank-You-for-Donating" letters printed.
Heavy rainstorm — chairperson's garage roof leaks- all 100 posters ruined.
- 17 Posters redone by hand at Chairperson's house.
Slot for appearance on "What's New in Bleep" radio show confirmed.
- 18 100 posters distributed. Finally!
- 19 Third Committee Meeting — Red Hart of Red Cross and Ms. Selya
Anything of the Metro Shopping Mall also present — everything looks good.
- 21 Obtain and/or confirm usage of all supplies.
Manpower confirmed.
News release delivered to all media for banner pick-up.
- 26 Chapter President and Committee Chairperson and radio station KISS
Talk show — "What's New in Bleep." All confirmed manpower
recalled — 4 of original confirms can't make it — still OK because we
Originally confirmed more men than we needed.
- 28 Blood Drawing site of Mall set up in a.m.
Blood drawn from 5:00 to 9:00 p.m. We get 63 pints.
- 29 Heavy rainstorm
Blood drawn from 5:00 to 9:00 p.m. we get 22 pints.
Radio station KISS called and they agree to announce blood drawing
Next day every 30 minutes.
- 30 Weather fine.
Draw blood from 8:00 a.m. to 6:00 p.m. we get 121 pints.
We did it!

- August 1 wrap—up news release to all media.
- 3 Thank—you letters mailed. Certificate of Appreciation presented To radio station KISS.
10. Completed Chairperson's Planning Guide and final report Submitted to membership.
11. Revisions and Changes in Plans.
- a. Armory was unavailable because of weekend maneuvers. We used Alternative plan and obtained Metro Shopping Mall.
 - b. Because of lateness of obtaining a facility, we didn't have time to get The posters printed, so we did them by hand.
 - c. Because we moved location of facility, we were covered by Mall's Insurance policy so we didn't have to purchase any.
 - d. Facilities Sub-Chairman decided to get furniture donated instead of Renting it. He got it donated by Elk's Club.
12. Record Income and Expenses. See "Budget Sheet."
13. Roles of Non-members.
- a. Red Hart, Executive Director Bleep Red Cross 171 Blood Alley
 - b. Dick Dracula, Comm. Dev. Dir. Bleep Memorial Hospital 23 Mercy Circle
 - c. Wolfsan Brushy, Disc Jockey Radio Station KISS 92 Elvis Place
 - d. 4 doctors and nurses from Bleep Memorial Hospital
 - e. Ms. Selma Anything, Community Relations Coordinator
Metro Shopping Mall 16 Down Payment Drive
 - f. Buck Brown, President Bleep Elks Club P.O. Box 127

EVALUATION

14. Capsule Evaluation.

Project was successful. We obtained 206 pints — six more than our goal. Hospital officials feel that this blood drive will totally alleviate the critical shortage during the harvest months this year.

With the exception of the facility problem and poster problem, we conducted the project as planned. These problems occurred early enough during the project and we were prepared enough to react to them immediately and were back on our plan by July 15th.

The committee has discussed what we each gained personally. General consensus that (1) working with other organizations made us realize how easy it really is to work with our competition, and (2) by talking with the Bleep citizens that gave the blood, we realized how great the people of our city really are. The citizens also gave us some good ideas for future projects. . Plus eleven of them are now Bleep A B A T E members.

15. Unanticipated Problems.

- a. Facility problem. Armory unavailable — we obtained Metro Shopping Mall.
- b. Poster problem. The first batch of hand— done posters were ruined when Chairperson's garage roof leaked during rainstorm had to do them over again.
- c. Heavy rain on Friday kept people away from Mall. Arranged that night with Radio station KISS for announcements every thirty (30) minutes on Saturday.

16. Recommended Changes.

- a. Have Mayor give first pint and get front page coverage the next day.
- b. Hold it again at the mall. More people and good atmosphere.
- c. Get radio station KISS to broadcast from Mall all day Saturday and Interview citizens as they give blood.
- d. Set table to recruit people — not just blood donors, but guys just out shopping.
- e. Use 12 hospital beds instead of 10.

17. Financial Problems Encountered.

Financially, a success — we were \$71.64 under budget. Because we were covered by Mall's insurance we did not incur that expense. The donation of chairs and tables by the Elks saved us that expense. Only item substantially over budget was for posters . . . we had to do them by hand — twice.

18. Benefits to be derived.

- a. Members deal with public and other organizations — increase their communicative skills.
- b. Organization, planning, and problem-solving skills can be enhanced.
- c. Learning how to deal with media in high visibility project.

NOTE: Following the Charter Chairperson's Planning Guide would be all the substantiating data:

Financial Data: Accounting records of where the money came from and how it was spent. Copies of bills paid.

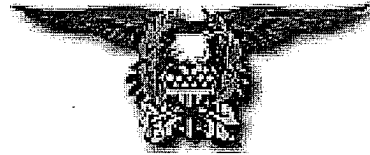
News clippings: Newspaper articles should include dateline, radio scripts, television scripts, local chapter publication articles, web -flyers, etc.

Correspondence: Copies of letters sent, letters received, and copy of form letter with list of to whom sent.

Photographs: Both black and white and color showing activities or accomplishments. Posed pictures of a group of people are normally meaningless. Pictures may be labeled as to why they are included.

Statistical records: Community survey with summary of results, police records, chapter surveys, diagrams, charts, etc.

Promotional material: Mailing, flyers, etc.



Dedicated to Freedom of the Road

A.B.A.T.E. of Washington- CHARTER CHAIRPERSONS PLANNING GUIDE

Projects Name: _____
Supervising Officer _____
Chairperson's Name _____ **Business Phone** _____
Home Phone _____ **E-Mail** _____
Chairperson's Mailing Address _____

PROPER USE OF GUIDE: Good advance planning and record-keeping will mean the difference between success and failure. Use this guide in planning and conducting your project, by completely answering each question as concisely and specifically as you can on a separate sheet of paper.

PLANNING:

1. Primary purpose. (What is the reason you want to successfully run this program?)
2. How does this project relate to the goals of ABATE of Washington?
3. What are the specific goals to be accomplished by your project? (Use specific numbers, etc.)
4. What are the specific person power assignments? (Show names and duties)
5. What materials and supplies will be needed?
6. What community resources will be used?
7. What problems do you anticipate needing to overcome to complete this project?
Outline alternative methods to overcome each problem.
8. List the specific steps to be taken to bring this project to a successful completion.
Show approximate date for each step.
9. Complete the proposed budget showing all anticipated income and expenses.

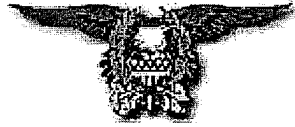
IMPLEMENTATION:

10. Record the specific steps taken and results of each.
11. Record any revisions or changes in plans as they become necessary.
12. Record any revisions or changes in plans as they become necessary.
13. Record income and expenses as they occur.
14. Record roles of non-members.

EVALUATION:

15. Give a capsule evaluation of the project in relationship to your plans and goals.
16. Describe any problems not anticipated and how they were handled.
17. What changes would you make if you were to run the project again?
18. Explain any financial problems encountered. Was the project a financial success or failure? Be specific, show profit or loss.
19. What benefits could the membership derive from conducting this project in the future?

_____ Date approved by Board of Directors _____ Date final report approved



Dedicated to Freedom of the Road

BUDGET SHEET

INCOME:

PROPOSED

ACTUAL

APPROPRIATION FROM ABATE:

OTHER SOURCES OF INCOME (LIST):

TOTAL:

EXPENSES:

PROPOSED

ACTUAL

COMMITTEE MEETING AGENDA

[Use the three (3) blank meeting spaces to rough out your agenda]

<p style="text-align: center;">"Sample"</p> <p>Committee Blood Drive Date July 5th Place _____ Chair _____ Home</p> <p>8:00 -Call to Order -Approve Minutes -Treasurer's Report (if needed) -Sub-Chair _____ Reports a. _____ Representative b. Public Relations c. Facilities d. Manpower</p> <p>-Old Business a. Insurance b. Posters</p> <p>-New Business -Chair _____ Comments</p> <p>9:00 -Adjournment</p>	<p style="text-align: center;">COMMITTEE MEETING NO. 2</p> <p>Date _____ Place _____</p>
<p style="text-align: center;">COMMITTEE MEETING NO. 1</p> <p>Date _____ Place _____</p>	<p style="text-align: center;">COMMITTEE MEETING NO. 3</p> <p>Date _____ Place _____</p>

CALENDAR OF COMMITTEE ACTIONS – AT A GLANCE

(Fill in the months that cover your project's activities – then fill in the day's number in the triangles in the upper lefthand corner of each square. Plot your planned actions and actual actions on the calendar. You'll now be able to see what you've accomplished and what remains to be done in one quick glance.)

Month of _____

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
/	/	/	/	/	/	/
/	/	/	/	/	/	/
/	/	/	/	/	/	/
/	/	/	/	/	/	/
/	/	/	/	/	/	/

Month of _____

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
/	/	/	/	/	/	/
/	/	/	/	/	/	/
/	/	/	/	/	/	/
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Month of _____

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
/	/	/	/	/	/	/
/	/	/	/	/	/	/
/	/	/	/	/	/	/
/	/	/	/	/	/	/
/	/	/	/	/	/	/

CHAIR/ NOTES

(Use these next two pages to record whatever you choose -- incurred expenses, notes for meetings, list actions as they actually happen, etc.)

Lined writing area with 20 horizontal lines.



